

Streamlining and training on Raiser's Edge to be ready for the future.



“Heller helped bring our entire organization together to use our Raiser's Edge system for much more than we had been. We now get much more value and utility from our tools which directly impacts our efforts.”

Todd Koolakian
Director of Philanthropy
Sacramento Children's Home

Challenges of the Present

Heading into their 150th anniversary, The Sacramento Children's Home needed to be ready to launch larger targeted fundraising campaigns. They had been using Raiser's Edge for over 10 years without applying its strategic or fundraising capabilities, so they wanted to determine if they would be able to use the tools they already had available. They contacted Heller Consulting for a System Assessment to determine the existing state of their installation, and if it would be able to serve their future needs.

Creating the Solution

After a detailed evaluation of the Sacramento Children's Home's Raiser's Edge system, and comparing that to their goals for the coming years, it was clear the most effective course of action would be to invest effort into updating their existing tools, and train their team on the features and capabilities they not been using.

To get started, Heller's experienced consultants worked with the Sacramento Children's Home team to determine the needs, reports, and processes that were dependent on the system. Not surprisingly, many of the organization's current requirements had evolved from when the system was originally set up over 10 years ago. Then the teams worked together to prioritize the updates that would have the most beneficial impact in the organization.

With the new requirements determined, Heller was able to help in several ways. First, Heller worked to streamline the original code structure, optimizing the demographic and attribute field data and implementing more efficient code logic and table configuration. The existing data and structure was making it difficult to get any use from the standard Raiser's Edge reporting tools, forcing many custom data queries that required time-consuming analysis in Excel.

Heller also helped the organization streamline their business processes to ensure consistent procedures for information entry and report analysis. Consistent procedures maintain the accuracy and usefulness of the data stored in the database over long-term use.

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Finally, Heller trained the staff on many of the classic and newer features they had not been using, and created clearly defined documentation to serve as an ongoing reference for existing and new staff.

Ready for the Future

With a streamlined system, optimized internal processes, and feature training, The Sacramento Children's Home will be able to create modern fundraising campaigns, and is ready to make the most of their 150th anniversary plans. The benefits include:

- **Accurate reporting** — The Sacramento Children's Home now has an accessible and easy to use dashboard of queries and reports to quickly create accurate data and summaries for actionable insights on program effectiveness.
- **Improved data sharing** — Staff can now share standardized reports across the organization for more effective communication about donors and initiatives.
- **Communication tools** — The organization is now trained in the capabilities of Raiser's Edge for fundraising and communication, allowing them to ensure the right donors and prospects get the right messages.

For More Information

For more information on this project or others, please contact us. From streamlining and optimizations to full system and strategy implementations, Heller can help your organization become more efficient and effective at delivering on your mission.

Contact us today.

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Heller's experienced team of nonprofit experts has a clear method for helping help you determine your organization's needs, and then can work with to you to create the right solutions built on proven technology and strategies.

We specialize in software and strategies that are designed to work flexibly with your organization, and we work across full system life cycle:

- CRM (Constituent Relationship Management) Roadmaps and Strategy Planning
- Software Evaluation and Selection
- Business Process Streamlining and Documentation
- Data Migration and Consolidation
- Product Training and End-user Education
- Full and Phased CRM Implementations
- Online, digital and web-based creative
- Campaign and organization-wide strategic and implementation services

Our staff has worked on the front lines of nonprofits around the country, and we understand how communication, fundraising and mission management software is used on a daily basis.

Let us help your organization make the most of your technology investment. Find out more about our team and what we can do for you at:

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